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ABSTRACT

In an effort to determine the current occupational outlook and resulting implications for education and training, the City College of San Francisco (CCSF), in California, undertook a study of current trends in the travel and tourism industry. This report provides findings from the project, which involved consultation with local and national practitioners and obtaining data from city offices and national travel industry organization, in four sections. First, a profile is provided of the travel and tourism both nationally and in San Francisco, indicating that nationally the industry employed six million people and generated $51.6 billion in tax receipts in 1992, and that it also supplies considerable revenue in the city. The next section provides an occupational outlook for the United States and the San Francisco area, in particular, citing growth in the past 10 years and projecting further growth in the future. This section also reviews the types of jobs available and the importance of workers being able to continue learning in the hotel, airline, and other travel industries. The third section reviews skills and competencies that contribute to a broad and flexible education and describes other public and private educational institutions in CCSF's area that offer travel and tourism programs. The final section discusses implications for the tourism curriculum, highlighting four program elements: a general tourism curriculum, language skills, work experience, and the integration of the curriculum to achieve broad competency training. (Contains 30 references.) (KP)

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ED 384 380

TRAVEL AND TOURISM INDUSTRY

PROGRAM OPTIONS FOR CITY COLLEGE OF SAN FRANCISCO

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CITY COLLEGE OF SAN FRANCISCO

A REPORT PREPARED FOR THE SCHOOL OF BUSINESS AND THE OFFICE OF INSTITUTIONAL DEVELOPMENT, RESEARCH AND PLANNING REPORT 946-04, DECEMBER 1994

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Introduction and Background

The purpose of this study is to identify trends in the travel and tourism industry -- both nationally and locally in order to determine the occupational outlook and subsequent implications for education and training. The School of Business, in cooperation with the Office of Institutional Development, Research and Planning, embarked on this research with the agreement that better, more up-to-date information was needed before any decisions could be made related to program review.

The Travel and Transportation program has been operating for many years. Almost eleven years ago it shifted its emphasis from travel and transportation to travel and tourism. During that time, hundreds of students have gained the skills necessary to be successful in careers in travel and tourism. Many of these students completed degrees and certificates; while many others completed the courses necessary to obtain their desired job. During the 11 years, the principle courses have been taught by JoAnn Derrick, a part-time instructor and full-time owner and operator of a successful travel agency in San Francisco. Due to faculty attrition, she is the only faculty member left in the program. Furthermore, there are only two courses offered in travel and tourism.

Given these facts, the School of Business chose to focus its program review efforts not on what the program is today, but rather on what it could be in the future. The goal of this endeavor has been to create a high-quality program with a clear vision that will be recognized by the travel and tourism industry as such. In partnership with the School of Business, the Office of Institutional Development, Research and Planning hired an independent educational research consultant to undertake this project and to report back industry trends and the implications for education and training. Reviewing two drafts prior to this report and providing invaluable feedback were: JoAnn Derrick (Travel Program faculty), Bob Gabriner (Director, Office of Institutional Development, Research and Planning), Steven Glick (Dean, School of Business), and Keith Kerr (Acting Chair, Business Department). This report was written by the consultant, Jennifer Curry Villeneuve, with the objective that it would support further planning efforts for the travel program.

This investigation of the travel and tourism industry involved consultation with numerous individuals involved in the industry locally and at the national level. Information and data were obtained from the following sources in San Francisco: the Office of the Mayor; the Convention and Visitors Bureau; the Private Industry Council; and the Chamber of Commerce. National organizations were consulted as well, including the Travel Industry of America Association; the Tourism Works for America Council; the American Society of Travel Agents; the National Travel and Tourism Awareness Council; and the Travel and Tourism Research Association. Airline representatives from American, Delta, Hawaiian Air, and United were also interviewed. A complete list of references is available at the end of the paper.

The paper is divided into four sections: in the first section, an overview of the travel and tourism industry is offered, citing national and local statistics that describe major trends. In Section II, the occupational outlook for the industry is described. Section III outlines some of the education and training requirements for jobs in the industry in addition to describing the providers of such education in the San Francisco area, including CCSF's program. General implications and areas for future exploration are discussed in Section IV.

I. Travel and Tourism Industry Profile

Travel and tourism is one of the nation's leading industry sectors; it plays a vital role in the American economy. There are a number of ways in which the industry can be analyzed: the number of people served, employee/payroll figures, and the overall economic impact of the

industry are the primary methods used. In this section, statistics are given that show that regardless of the method, this is indeed an impressive sector of our economy and way of life. The statistics are also meant to provide the reader with a sense of the scope of this industry. It is quite diverse, and connected to many other sectors in our economy.

National Picture of Tourism[1]

Evidence for the significant contributions by the tourism and travel industries are outlined in a recent report, *Tourism Works for America*, which cites that domestic and international travelers spent $361 billion in the U.S. during 1992; six million people were employed in the industry during 1992, making it the nation's second-largest employer after health services; travel generated $51.6 billion in tax receipts during 1992; and payroll gains were seen during 1992 due to travel employment, mostly in public transportation, food service, and lodging sectors of the industry. Travel employment produced a total of $99.2 billion in payroll, an increase of 4.6 percent from 1991. In addition, overall domestic travel increased 8.5 percent during 1992 to reach over a billion person-trips, according to the U.S. Travel Data Center's National Travel Survey.

There are many diverse sectors that make up the travel and tourism industry, creating ripple effects with both direct and indirect impact on the economy. The U.S. Travel Data Center divides the industry into the following categories: Food Service, Public Transportation, Auto Transportation, Lodging, Entertainment and Recreation, Travel Planning, and General Retail Trade. These general categories mask the considerable diversity and variety of positions involved in the industry. Travel planning, which is the general category most closely associated with travel agents, reservationists and tour guides, also includes other aspects of inbound travel planning, i.e. all the travel services needed by visitors at their destination. For example, many visitors choose San Francisco as their main destination, yet request day or multi-day side trips to other places in California or the United States. Inbound travel planners would arrange for these trips, including transportation and accommodations. Another example of the problematic nature of these categories is public transportation, including airline travel, which represents a large proportion of the money spent in travel and involves numerous sub-industries.

There are many other hidden industries within these broad categories, making it difficult to grasp fully the scope of the industry. Some of these are listed below, illustrating the broadness of the industry as well as the economic impact. For instance, meetings and conventions generated $75.6 billion in revenue, according to a study released by the Convention Liaison Council. Nearly 500,000 tours were conducted by 1,636 U.S. tour operators during 1992. These tours carried 16.5 million passengers, resulting in $5.4 billion in tour-related expenses.

Travel agencies processed over $51 billion in airline sales in 1992, an increase of seven percent from 1991, despite slowed growth of new retail and ticket delivery agencies. There were 32,147 retail locations in 1992, and according to Travel Weekly magazine, the top 50 travel agencies in terms of sales generated approximately $25 billion in revenue during 1992. Seventy percent of sales were produced by smaller agencies. Approximately two-thirds of U.S. travel agencies are single-location businesses. The average travel agency volume is almost $3 million annually. The American Society of Travel Agents (ASTA) has 20,000 members in 125 countries who include both travel agencies and travel suppliers. ASTA is quite active at the national political level, lobbying congress on behalf of its members. In fact, they were instrumental in setting up the first ever White House conference on tourism scheduled for Spring 1995.

Air travel is a significant part of the travel business. Airline fares in 1992 were the lowest in over a decade, and over 473 million passengers traveled, according to the Air Transport

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[1] Data reported in this section is from the Tourism Works for America Report, published by The National Travel and Tourism Awareness Council, 1994. Where other references are listed, they were reported in the same document.

Association of America. The number of domestic passengers grew by four percent, and international travel increased by nine percent. U.S. airline employment was 540,400 at the end of 1992, higher than the previous year, though not as high as the record number of people working in the industry in 1990. Airlines lost more than $4 billion in 1992 despite revenues of $78 billion. The low fares in most cases did not cover the cost of providing the services, which is why airlines are focused on reducing costs. Many have canceled or delayed aircraft purchases, laid off employees, and reduced salaries in an effort to bring costs in line with what consumers are willing to pay for air travel.

Other transportation sectors increased their share of the market as well. Cruise lines are another areas of growth in the travel industry; the cruise industry in the U.S. directly and indirectly created 63,168 core sector jobs, according to a study conducted for the International Council of Cruise Lines. Overall, the cruise industry generated 450,166 jobs, $14.5 billion in wages, and $6.3 billion in tax revenues during 1992. Rail travel, however, declined by approximately three percent since 1991, the first decline in revenues since 1975. The decline is said to reflect the slow pace of the economy, airline fare wars, the freight rail strike, and Hurricane Andrew.

The lodging industry, another major part of the tourism industry, is rebounding strongly after four years of decline caused by over building and a lingering recession. Occupancy rates in 1992 improved to reach 62 percent, an increase of 2.5 percent over 1991, according to Smith Travel Research. In addition, the lodging industry went from a pre-tax loss of nearly $3 billion in 1991 to a pre-tax profit of $22 million in 1992. The American Hotel and Motel Association expects the turnabout in the industry to continue into 1994.

San Francisco Profile of Tourism[2]

The San Francisco profile of the travel and tourism industry is very similar to the national picture. According to the Chamber of Commerce, tourism is San Francisco's number one industry. More than 13 million people visit San Francisco each year. Readers of Condé Nast Travel Magazine have consistently ranked San Francisco their favorite U.S. city; in 1991 and 1993, they voted San Francisco the number one city in the world.

Tourism in San Francisco generates big dollars: visitors spend nearly $4 billion annually, boosting the local economy and providing a continuous flow of income for the business sector. Visitor spending sustains more than 66,000 jobs and generates more than $216 million of city revenues annually. San Francisco offers a selection of lodging; the city's room inventory has increased 16 percent since 1988 to a total of 30,000 rooms.

Profiles of visitors to San Francisco show that more foreign tourists are coming than in years past. International visitors compose 36 percent of all hotel guests, compared with less than 25 percent ten years ago. Implications of these changes on the types of jobs or services will be discussed in a later section.

Visitors to San Francisco have a variety of popular areas and attractions to choose from: Fisherman's Wharf was visited by 87 percent of all tourists; Chinatown by 72 percent; the Golden Gate Bridge saw 68 percent; Union Square 65 percent; Cable Car rides 64 percent; and Golden Gate Park was visited by 53 percent of the tourists surveyed.

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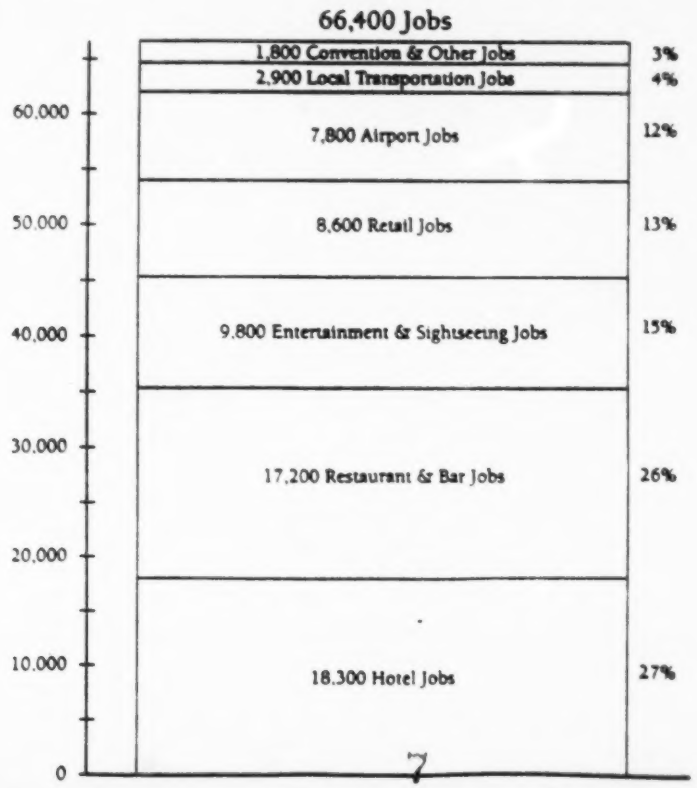
[2] Data reported in this section is from The San Francisco Visitors Bureau, The San Francisco Chamber of Commerce, and from data used in Economics Research Associates 1987 report, The Economic and Employment Impacts of Visitors to San Francisco, which was conducted for the San Francisco Planning & Urban Research Association and updated with information from the 1989 Survey of San Francisco Visitors conducted for the Bureau of Economics Research Associates.

San Francisco is also a popular convention and meeting destination. The Moscone Center has 442,000 square feet of exhibit space and 161,000 square feet of meeting rooms. The city hosts over 200 trade shows and conventions annually, with the top 25 drawing more than 300,000 visitors. The newly opened Yerba Buena Gardens Cultural Center, featuring museums, galleries, theaters and a dance studio, is expected to draw tens of thousands of tourists and shoppers to the area around the Moscone Center.

It is estimated that there were more than 28 million visitor-days spent in San Francisco annually by out-of-area visitors. Bay Area residents who come to the city for shopping, dining, and entertainment usually account for an additional 12 million visitor-days, resulting in an average daily visitor population in San Francisco of more than 110,000 people. Annual spending by out-of-area visitors is estimated to be more than $4 billion; an average of $10.6 million a day. A profile of these out-of-area visitors helps illustrate the importance of certain travel industries. Approximately 74 percent of the visitors to San Francisco arrived by air; 20 percent by car; and the remaining by train, bus or other transportation. About 38 percent were first-time visitors; more than a quarter (26 percent) were frequent visitors (5 or more visits); and more than one-third (36 percent) were from out of the country. The primary purpose of the visit was listed as pleasure/vacation (57 percent), followed by business only (22 percent), and convention/meeting (16 percent).

Through the Office of the Mayor and the San Francisco Convention and Visitors Bureau, the city was recently notified of its status to host the 1999 Super Bowl. It is estimated that this event will generate over $200 million in revenues for the city, and will result in the creation of jobs in many sectors of the tourism economy.

It is estimated that over 66,000 jobs are directly supported by visitor spending in San Francisco, with a payroll in excess of $1 billion. Nearly half of these employees are ethnic minorities and more than 60 percent reside within San Francisco. When adding in the jobs generated by those businesses supplying the visitor industry, the employment impact is nearly doubled. The jobs are broken down by industry in the Figure below.



II. Occupational Outlook

In the previous section, statistics were provided as to the number of jobs directly and indirectly attributed to travel and tourism. In this section, more detail is provided as to the number of jobs, the quality of jobs, and areas projected to increase. The information is from fairly traditional sources consulted for employment changes. Unfortunately, these sources do not have adequate methodology for tracking emerging careers, nor do they account for job growth that cuts across industry categories. Therefore, certain caveats are warranted for the next section. Given the considerable growth expected in the travel and tourism industry, as indicated in the statistics in the previous section, it is reasonable to expect that the employment numbers below underestimate real job expansion and growth in the industry.

Travel Industry Employment Nationally[3]

The travel and tourism industry is the largest export segment of the U.S. economy, the second largest private employer, and the third largest retail segment by dollar volume. The outlook for travel in the coming years is positive. Domestic travel is expected to increase given the demographic changes of our population, including "baby boomers" and the growing "mature" market.

As of 1992, travel industry employment has involved over 6 million jobs. An additional 5.3 million jobs were supported by indirect and induced sales. The following general facts are useful in considering the real impact of these jobs:

- Employment directly related to travel has grown 56.3 percent in the last ten years, more than twice as fast as the more modest 21 percent increase in total non-agricultural U.S. employment.
- Employment in major travel industry sectors is forecast to grow in excess of 30 percent during the next 12 years. This compares very favorably to other major industries in the economy.
- The travel industry ranks as the 1st, 2nd, or 3rd largest employer in 30 states. Only health care services consistently outperform the travel industry in producing employment.
- Average hourly earnings in the services sector have grown faster than in all other industries excepts finance, insurance and real estate in the past ten years.
- Service sector earnings per hour are now equal to the average for all private industry sectors, and have made significant inroads on other lower growth sectors such as manufacturing and construction.
- The transportation sectors of the travel industry, including intercity and rural bus transportation and airlines, rank among the highest paying sectors in the U.S. economy.
- High compensation positions exist throughout the travel industry. More than 65,000 executive positions exist in all segments of the industry today. These positions are expected to increase faster by the year 2005 than employment in the overall economy.
- Flexible employment, which is becoming increasingly important to the diversified economy and labor force, is offered by many segments of the travel and tourism industry.

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[3] Data in this section is from A Portrait of Travel Industry Employment in the U.S. Economy, published by the Travel Industry of America Foundation, January 1994.

Since the focus of this investigation is on travel and transportation, a closer look at occupations in air transportation is appropriate. Air transportation represents the largest employment sector of the transportation segment of the travel and tourism industry. In 1992, there were 729,000 jobs in a wide variety of technical and managerial positions. These jobs include pilots, customer service representatives, reservations/ticket agents, public relations, general managers, baggage handlers, aircraft mechanics, flight attendants, food service workers, controllers, and top executives. Employment in the administrative support jobs, including clerical, reservations, and transportation/ticket agents represents about one-third (32.3 percent) of the total for the category. This is expected to remain stable in the next decade (expected growth to 32.7 percent).

San Francisco Bay Area Employment Profile[4]

In San Francisco County, economic changes have had a significant impact on the types of jobs available as well as the skills needed to obtain employment. According to the Labor Market Information Project, San Francisco County can expect to grow by about 8,900 jobs during the 1990-97 period. Services and retail trade will account for all the payroll gains during this period. All other industry divisions are expected to lose jobs. The projections take into account the loss of several thousand jobs during the economic recession of the early part of the period. Occupational projections for travel agents indicate an increase of 3.4 percent, or 40 new jobs. Yet the number of openings expected due to separations is 300. Overall in the services occupations, it is estimated that there will be 21,700 openings due to separation, and 3,630 actual new jobs.

In nearby San Mateo County, similar trends are expected in the services industry, and all industries are expected to add jobs. Transportation jobs are expected to increase by about 4,700 jobs. Two-thirds of the jobs in San Mateo County are in the services, retail and wholesale trade, and transportation sector.

Jobs and Careers in Travel

The general statements about the industry mask numerous layers related to employment, emerging careers, and the levels of jobs. Service sector jobs are extremely diverse, requiring different levels of education and training. It is critical in this analysis to determine the level of the market that City College is training workers for in the short and long terms. Much of the writing at the national level on vocational and occupational training concludes that traditional technician level positions, those often trained for at community colleges, prepare workers for low wage, short term jobs (Carnevale et al, 1990). The calls, therefore, are to expand the training so that the same workers have more options to learn and grow as their job changes.

These points will be returned to in the next section on education and training. They are pertinent here, however, since traditional ways of analyzing jobs fail to account for changes in the industry. Examples of this are found in recent studies done by the San Francisco Private Industry Council through the State/Local Cooperative Labor Market Information Program, which has studied the wage, training and experience requirements, benefits, and employment/industry trends for about two dozen occupations each year for the past three years. Summaries of the findings for Travel Agents, Guides, Hotel Desk Clerks, and Reservation and Transportation Ticket Agents are summarized here. While they are useful in describing these occupations, they also show how limited these classifications are, and how these methods of collecting information underestimate the job potential.

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[4] In addition to the TIA report used in the previous section, materials from the Employment Development Department, the Private Industry Council, and the California Occupational Information Coordinating Committee were consulted for this section.

The study on Travel Agents was part of the 1992 survey of employers. Travel Agents "plan entire trips for customers of their travel agency. Their duties include determining destinations, modes of transportation, travel dates, costs, accommodations required, and planning, describing or selling itinerary package tours. Travel agents may specialize in foreign or domestic service, individual or group travel, specific geographic areas, airplane charters, or package tours." The occupational trends for 1990-97 indicated that the industry will experience average employment growth during this period, and that it will remain a medium size occupation. Employers reported that they have at least some difficult finding qualified, experienced applicants, but little difficulty finding qualified, inexperienced applicants. Most of the hiring in the 12 months previous to the report was due to turnover. It was also reported that most employers find travel agents through current employees referrals, newspaper advertisements, and private employment agencies. Many employers also find employees through in-house promotions/transfers, and some through private vocational schools. The primary employers are travel agencies and tour operators. This report's findings point to the importance of work experience for one's employability.

Guides were studied in the 1993 report. They "escort individuals or groups on cruises, sightseeing tours, or through places of interest, such as industrial establishments, public buildings, and art galleries." The occupation size is small, and growth is expected to remain stable, without the addition of new jobs, however. It is estimated that in 1990, there were 200 people working in this industry. Employers reported little difficulty finding applicants, regardless of experience level. The major employing industries include tour operators, travel agencies, and museums. Most guides are employed as seasonal independent contractors and may work between 0-60 hours/week. These numbers seem low, and most likely do not account for the number of translators or private escorts leading groups in the city.

Hotel Desk Clerks share many of the same characteristics of people in other service/hospitality positions; therefore, they are included here. They "accommodate hotel patrons by registering and assigning rooms to guests, issuing room keys, transmitting and receiving messages, keeping records of rooms occupied and guests' accounts, making and confirming reservations, and presenting statements for collecting payments from departing guests." This is a medium size occupation. Employment grew faster than average from 1988-93, but employment declined slightly in 1991 due to the slow economy. Most employers reported that they have some difficulty finding qualified experienced applicants, but little or no difficulty finding unqualified inexperienced applicants. A moderate turn over rate was reported by employers in 1991, when this analysis was done.

Reservations and transportation ticket agents were also studied in 1991. They "make and confirm reservations for passengers and sell tickets for transportation agencies such as airlines, bus companies, railroads, and steamship lines. They may check baggage and direct passengers to a designated concourse, pier, or track." This is a large occupation, and employment growth from 1988-93 was faster than average. Employers reported that they have some difficulty finding qualified experienced applicants, but no difficulty finding qualified, inexperienced applicants. Most employers find their workers through newspaper advertisements, current employee referrals, in-house promotions/transfer, and/or private and public schools and training programs. The major employment sources are air transportation companies and tour operators.

Given the focus of the current CCSF program emphasis on travel agent training and career preparation in related fields, a closer look at trends is important. A representative of a major tour wholesale company outlined two categories that travel agents can be broken into as an illustration of the diversity of jobs and skills that fall under this one main heading. In the first category are people who are primarily reservationists and ticket agents. These people tend to be in business travel companies or in house at travel agencies. The skills required are relatively straight forward and easy to learn quickly. They primarily do transactions, i.e. reservations and ticketing. This involves computer skills and some basic customer service skills. The second category is where

much of the industry change is taking place. These are the travel managers and travel planners who focus on destination management for customers. They assist people in making all the arrangements for business travel or for planning vacations. Typically these are independent general managers of their own travel agency business, who build up a customer base and work to expand it. The skills associated with these jobs are more sophisticated: one should have a good understanding of people, of geography, and good business knowledge about how to close deals. The primary role played by this second type of travel agent is as a sales person. The important distinction made between the two categories is that given the changing world of automation, one is easily replaced if the basic transaction is all that can be done. The need to add value for the customer is growing.

Other trends affecting travel agents include increased automation, lower commission rates from airlines, and ticketless travel. These trends are forcing travel agents to change their focus and emphasize their "value-added" services more than acting as mere ticketers. These trends were echoed throughout the travel literature, and by industry representatives interviewed.

Airline Employment

The airline industry has gone through major changes in the last five years. Downsizing and other cost cutting measures are quite common at all the major carriers. There has also been an increase in contracting out work formally done by employees, such as maintenance and ramp operations at some airlines. There is considerable attention on staying competitive in the industry, as the frequent fare wars indicate. Air travel is expected to increase substantially in the years ahead. It is expected that much of this increase will happen in corporate/business travel, yet leisure travel will continue to increase as well.

The industry involves a variety of jobs; from ticket agents and reservationists, marketing and sales, pilots and flight attendants, to the more technical areas of maintenance and operations. In all of these areas, workers are being called on to use more general skills such as problem-solving and critical thinking. Increased automation in the industry is forcing workers to upgrade skills; in addition, it is making jobs more competitive for entry level applicants.

Airline representatives were mixed in their predictions about future job openings. One carrier, which recently cut jobs during a reorganization, predicted hiring in the customer service area, defined as reservationists and ticket agents, only as many people as needed due to turnover. They reported hiring from their part-time workforce before looking outside. Another carrier, which is much smaller, foresees minimal growth in its sales team and reservationists. Another airline reported that the reservations and ticket agent area would experience growth, as well as their sales force. They have been focusing on corporate travel, in particular working with businesses to manage their travel, as more corporations become savvy about travel costs and ways to reduce expenses. This is an important shift that industry representatives talked about -- the airlines are taking more control over the travel business by focusing on corporate clients rather than travel agents as clients selling their airline. Another major carrier has announced plans to hire more than 400 flight attendants, in addition to jobs in customer service, and marketing and sales as part of its expansion efforts.

Skills associated with the travel industry will be discussed in the next section on education and training. However, it is useful to note here some of the skills deemed important by airline representatives. One representative emphasized the need for "new" skills in the industry since employees are expected to do more with less. In particular, he suggested analytic skills, general knowledge of economics, and strong familiarity with computers. He also indicated that language skills other than English are useful.

Other Travel Industries

Tour packages are often sold through wholesalers, who package and sell tours and vacations. The president of one of the largest wholesalers in the area estimated that they would be hiring people in the future in the area of sales and ticketing. They tend to hire travel agents and reservationists year round. He provided extensive input about industry changes as well as offered ways of defining what it is people do. He emphasized the importance of the marketing side of the travel business given that the industry is made up of retailers, wholesalers, and consumers. People going into the industry must know how to counsel, advise, and sell the product. This training, in his opinion, does not exist.

The skills most desired for someone entering the wholesale business include: selling skills, basic marketing skills, and experience with a windows computer environment. They are constantly hiring due to both growth and turnover. This particular company does their own three week in-house training. While they hire people from travel programs, they also hire people with more general backgrounds in sales and marketing.

Perhaps the more dramatic change observed in the industry, as stated above in the distinction between two types of travel agents, is the role travel managers/planners play as advisors. Destination management, rather than general ticketing, is a much more important part of the business. Travel agents cannot survive as plain ticket agents anymore, given the reduction in commissions and lower air fares. The added value that travel agents or travel planners give the customer is advice and counseling on the destination.

Another area to examine is the cruise ship industry. San Francisco has been trying to lure back cruise line business, once a booming industry in the area. One line still operating out of San Francisco, Royal Cruise Lines, has recently been looking to hire people with specific language expertise. This is an indication of the growing need for qualified workers with broader skills than acknowledged in the past. The ability to speak other languages is becoming more important in this global economy.

III. Education and Training

The previous section described a changing environment in which what you know may not be as important as your ability to continue to learn. Like other areas in our economy, people are going to be changing jobs in their career. All indications are that people who will be most successful in the travel and tourism industry will be those who are broadly trained. This section will introduce some of the skills and competencies that contribute to this broad training. The latter part of this section offers brief descriptions of other education providers in the area in addition to a general description of CCSF's program.

There has been much written in recent years on the changing paradigms in the world of work. Global economic pressures, work force diversity, and advances in technology are radically changing the nature of work in this country. Many employers have experienced restructuring and downsizing, resulting in greater demands on the existing workforce. These trends have led employers to seek skilled workers who are capable of independent functioning and problem solving and who can work in self-directed work teams. Former Labor Secretary Brock states: "Today it is impossible to predict all of the skill requirements of the future. Thus we must also impart a breadth of skills that give individuals the flexibility to meet unforeseen opportunities and change." This "breadth of skills" is what the SCANS report defines in five competencies and a three-part foundation. The competencies are in the skill areas of resources, interpersonal, information, systems, and technology. The foundation covers basic skills, thinking skills, and personal qualities. The recommendations are that schools modify their programs in ways that

reflect these broader needs. Integrating curriculum and providing work experience are two examples.

These calls for increased skills and competencies are consistent across a number of current education reform movements; the School to Work Opportunities Act, Tech Prep programs, and the move towards a greater integration of academic and vocational curricula are all focused on expanding students' ability to learn how to learn. These reforms are quite relevant in the discussions of travel and tourism in two major ways. First, the labor market studies done on a few of the travel occupations indicated that employers had more difficulty finding applicants with experience. The School to Work programs that are most successful have strong work-based learning programs such as cooperative education, internships, or apprenticeships. Considerable benefits have been reported in the research literature confirming the effects of work-based learning in conjunction with school-based learning when they are properly coordinated. The second important reform is the integration of academic and vocational curriculum. Tech prep programs do this more formally by coordinating courses into a well-developed program. But there are other examples of modifying traditionally vocational curriculum to include more writing, problem-solving, and connections to other subject matters. Similarly, adding to the curriculum more information about all aspects of an industry contributes to workers becoming more broadly trained.

The integration of academic and vocational curriculum, which results in a more interdisciplinary program, in essence creates alternative road maps students need to be prepared for a changing industry. In the case of travel and tourism, courses in marketing and sales, hospitality industry management, economics, and social sciences could help round out the curriculum.

The travel industry can provide transferable skills (TIA, 1994). The U.S. Departments of Labor and Education began a National Skills Standards program in 1992 to identify the specific skill, knowledge, and ability levels needed to perform various jobs in specific industries. The hospitality industry is one of the sectors being examined, and the Council on Hotel, Restaurant and Institutional Education (CHRIE) has been actively involved. They are working with schools and industry representatives to make more of the documented, transferable skills recognized. Preliminary work indicates that computer skills, interpersonal skills, and personnel management are particularly necessary in the industry. These skills, it was also found, are easily transferable to other industries.

Travel and Tourism Education Providers in the Bay Area

There are a number of education providers in the San Francisco area that provide education related to the tourism and hospitality industry. They vary greatly in size, scope, cost, and mission. The first group are the public community college programs, followed by the travel agent trade schools, and lastly the programs that offer four-year degrees.

Public Community Colleges

City College of San Francisco

There are two parts to the Travel program as it currently exists at CCSF: students can prepare for a certificate (typically one-year), or earn an Associate degree. The program name is a bit confusing; the certificate offered is in Travel and Tourism, yet the Associate Degree is offered as Travel and Transportation. The name should be changed to the former for both programs to more appropriately reflect the content taught.

The "major" curriculum consists of two courses covering the principles of travel and tourism. Both courses are currently taught by a part-time instructor who owns and operates a successful travel agency in the area. The two courses -- Principles of Travel and Tourism (Business 157), and Advanced Travel and Tourism (Business 159) are offered in alternating terms. Interestingly, the advanced course is offered in the Fall, the beginning course in the Spring term. The introduction course, Business 157, offers an overview of the travel and tourism industry with

special emphasis on the travel agency business. It is a general survey course for students interested in careers in travel as well as people interested in knowing more about the industry for their own travel plans. The advanced course, which goes into greater detail, covers "methods of developing a travel destination, advertising and selling that destination, dynamics of tourism sales and marketing concepts including wholesale and retailing practices of the travel industry." Students enrolled in this class tend to be more focused on careers in travel.

Approximately 55 students enroll in each course each term (the cap is 59). The students come from diverse backgrounds and experiences. In the advanced class, there are more than 19 languages spoken, and all but seven of the 39 students were born out of the country. Students use their language skills to get jobs in bilingual agencies, including consulate offices and foreign airlines. Graduates of the program find employment in a variety of occupations, including as travel agents, tour guides, creating and selling tour packages, and for a variety of jobs with cruise lines and airlines (reservationists, sales people, agents, on-board representatives).

City College has a well-known hospitality management program which trains people for the lodging and food service sector of the industry. Students enroll full time in this two year, intensive program. Students typically go to work for restaurants and hotels upon completion of the program.

Canada College

The southern most college in the San Mateo County Community College District, Canada offers both a Certificate and an Associate in Science degree in Tourism. There are four options in the program: 1)tourism airlines sales; 2)leisure travel; 3)tourism group travel; 4)tourism/corporate travel specialist. Each of these certificate programs require at least 28 units. For the Associate degree, students must take an additional 18 units of general education and 2 units of PE. The rest of the 60 units can be electives. It is difficult to determine the overall size of the program, but the counselor indicated they enroll approximately 100 new students each semester. In Spring 1995, 15 core courses are listed in the catalogue under tourism.

Skyline College

Also part of the San Mateo County Community College District, Skyline has a Hospitality Administration program which covers 'Hotel Operations' and 'Meetings and Convention Management' programs. Students have the option of earning an Associate in Science degree or certificate in either area. The catalogue states: "In addition to general management principles, the students learn the specific skills needed to be successful in the hospitality industry, while developing an awareness of the entrepreneurial opportunities in the field. They also have the opportunity for on-the-job experience through the Hotel Work Experience Program." Furthermore, all of the courses can be transferred to a CSU campus.

Private Travel Schools

Echoes International Travel Training Courses

This training school, established in 1975, offers curriculum which "covers all aspects of travel, using up to date source and reference materials, and conducted by well known executives and training specialists from major carriers, tour operators, and travel agencies." The school is approved by the Council for Private Postsecondary and Vocational Education. The school focuses on training travel agents and/or wholesale tour and group operators. The majority of the graduates are preparing to work for retail travel agencies. A diploma is awarded upon completion of the course, which involves 250 clock hours of classroom work, including 90 hours of computer training. The training takes 12 weeks to complete. Classes are held daily, and students must attend full-time. Tuition, including all classroom supplies, books and materials is $2,975.00. About 30-40 students start the program at a time, which is offered four times per year.

Heald Business College

Heald's recently started a Hospitality and Tourism Evening Program which focuses on "an introduction and overview of career opportunities in Hospitality. Courses reflect a synthesis of the major areas involved with hotel operations and management. The program includes a thorough study of computer applications, business procedures, and personnel relations." They offer an Associate in Applied Science Degree in eight quarters (120 units). Tuition is $1600/quarter (14 weeks). The courses are only offered as a degree program. A new program, the first classes will be offered in January. The school expects to have about 40 students.

Pacific Institute of Travel

The training at this school takes place in the offices of a "major full service travel agency." The training requires 120 hours (10 weeks), and a certificate is awarded upon completion. There are twelve classes offered, ranging from computer training to geography and employment planning. Tuition is $1,745.00. The school claims a 90 percent placement rate of its graduates, who typically go to work as outside agents for travel agencies. Usually 12-16 students start at a time; the maximum is set at 16 to ensure each student has a computer terminal.

San Francisco School of Travel

Training travel agents since 1977, the San Francisco School of Travel offers a basic travel agents course of 300 hours Monday through Friday from 10:00-3:30 p.m.. The 300 hours includes 150 hours of airline computer training. An evening program is also available from 6:00-9:00 p.m. three evenings a week. Training is provided on APOLLO and SABRE reservation systems. According to the catalogue, the "object of this in-depth and comprehensive course is to prepare the student for a career in the fascinating travel industry. The emphasis is for a travel agency position. However, the course is also beneficial to those who wish to enter other travel industry fields such as cruise lines, airlines, hotels, etc." The school is approved by the Council for Private Postsecondary and Vocational Education. Tuition is $2,100, registration is $100, and books and materials are $225.00. The program starts six times a year with a maximum of 20 students each term. The average size, according to the school, is 8- 11 students.

San Francisco State College of Extended Learning

While San Francisco State is not a private school, the division of Extended Learning offers non-credit programs for which students pay the full cost of instruction. In the Tourism program, students "may prepare for a career in tourism by selecting individual courses or by participating in the complete Tourism program." The Tourism program, which consists of eight core courses and seven electives, usually takes two semester to complete. The program is approximately 150 clock hours, or 15 credits of Continuing Education Units (CEU). The program also offers the American Society of Travel Agents (ASTA) Proficiency exam, a standardized exam that covers domestic air travel, land arrangements, and cruise and ship transportation. The purpose of the ASTA exam is "to provide travel agents with the opportunity to demonstrate their competence in a way that can be recognized by clients, employers and peers." Core courses typically enroll 30-40 students; the elective classes tend to be smaller. Often students get jobs through their field experience, which is coordinated when they take the co-op course. This involves 40 hours of volunteer work in a travel agency.

Four-year degree programs

The four-year degree programs focus more on hospitality management than travel. Both programs described here offer spaces to transfer students, an area for further consideration.

Golden Gate University

This is a private university offering undergraduate and graduate degrees, including a B.S. in Hotel, Restaurant and Tourism Management, and an M.B.A. with a Hospitality Administration Concentration. The program is "a respected high level degree program known for its emphasis placed upon financial and practical management skills. Course work is designed to qualify

students who are either planning to enter the hospitality field or who are seeking to further their careers through advanced study." The focus of the courses is closer to the hotel and restaurant industry than travel and transportation. Tuition and fees are $245/unit for undergraduates, and $348/unit for graduate courses.

University of San Francisco

The McLaren School of Business offers an undergraduate degree in Hospitality Management. The curriculum, which includes general education towards the degree, focuses on hotel and restaurant management. Students must be admitted to the university in order to enroll in these courses, and must complete general education courses as well.

IV. Implications and Next Steps

The evidence offered in this report supports the following statements about travel and tourism both locally and nationally:

- Tourism is an integral industry in our local and national economies.
- Job growth is expected in the travel and tourism industry in the years ahead.
- There are a number of schools in the Bay Area which provide travel agent training. These are primarily short-term, vocational programs.
- Changes are taking place in the airline industry that are affecting the kinds of jobs that will be available in the future.
- Workers in the future will need a wider variety of thinking and learning skills to remain competitive in the changing job market.

Given these statements, there are a number of options for the travel and tourism program at CCSF. On one end of the continuum is to continue with business as usual, offering the two courses each year. At the other end is to create a unique niche in the tourism market in San Francisco by developing a high-quality program which addresses the market demand reported in this paper. There are certainly options in-between, which share many of the features of the most sophisticated program option, but in less depth. These will described below. The extent to which a program adopts these pieces depends on numerous resource factors. However, it is critical that the college assess the level to which it is prepared to act, and the expected return on such action in comparison to the competition. Evidence in this report indicates that there are indeed areas for expansion for CCSF, yet it also shows that there are a number of other competitors.

Program Elements

The following four elements of a program are offered for further consideration. These are based on extensive research literature on workforce preparation and training, in addition to feedback received from industry representatives interviewed for this report. They include the general substantive curriculum, special skills such as language, work experience, and general education curriculum that complements the vocational training.

General Tourism Curriculum

The extent to which a program offers a variety of industry-related courses determines its scope. Some of the programs described in the previous section offer numerous classes covering tourism and travel, while others have only a few. A few options to consider have to do with what constitutes the general substance of a program's curriculum, including tourism, marketing, communication, computer training, business management, customer service, and others. A career

cluster focused on travel and tourism would include these and other courses, and could focus on the skill standards of the industry. There can also be options to specialize, such as ticketing, hotel-restaurant, tours, or travel planning. Adding extra skills, such as language certification or specific geographic knowledge, are also options to consider, and will be discussed next.

Additional Skills/Language Expertise

The diversity of students attending CCSF is a major strength of the program. Many students have skills in languages other than English which could give them a competitive edge in the job market. There are a number of ways in which one could improve a program by expanding language skills and requirements. Given the trend towards industry-recognized skills, creating a way in which to certify students' language abilities by levels could be a desirable option in a program. For example, students who test (orally and/or written) at certain levels based on a standardized exam would be able to prove their proficiency to a future employer. This certification adds to a student's portfolio, which may include some of the other elements as well.

Work Experience

Employers increasingly hire based on experience rather than solely on degrees or certificates. Cooperative education, an instructional pedagogy providing students with on-the-job training that supplements their curricular learning, can bridge this gap quite successfully. Other methods of offering work experience include internships and apprenticeship programs. While many community colleges offer some form of work experience, high quality programs coordinate the work-based learning with the school-based learning. Issues of quality are extremely important in any partnering with business and industry; work experience programs must be carefully executed. In addition, how students make sense of their experience is important. Some programs include a one unit seminar for students to discuss their work experiences with each other, to work on career planning, and to set work objectives. Students are then able to integrate what they are learning in class with their on-the-job experiences.

Integration of Curriculum/Broad Competency Training

One of the primary differences between a community college program and one offered from a vocational trade school is the curriculum offered through general education courses. Students have choices available to them at a community college that they do not otherwise have at other institutions. However, many programs do not require a diversity of coursework, nor do they provide opportunities for students to study material relevant to their career objectives. If broad competency training is an objective of a program, students would have a variety of options related to their career area that offers different training and learning. Tech prep clusters are good examples of ways in which programs have successfully become more interdisciplinary.

Combining Program Elements

These four elements -- general tourism curriculum, language skills, work experience, and interdisciplinary curriculum have varying depths and levels. They are elements that lend themselves to different combinations. In addition, they can be developed over time. A program might start out by adding courses in the first area and expanding work experiences. A more developed program would have more sophisticated aspects of all four, including the language certification and a well coordinated work experience program.

The chart below provides options for consideration. Please note that these are preliminary sketches of programs, not fully developed models. They are offered here for further consideration, not as recommendations.

Each option incorporates the program elements at a different level. Option one describes the current program; Option two adds to the curriculum, increases the coordination levels with other departments, and reinstates work-based learning experiences. Option three introduces specialization areas in the tourism curriculum, brings in language skills more, develops the work experience elements much more, and brings in general education courses more deliberately. Option four is the most in-depth program in which different tracks are offered in the tourism curriculum, students' language ability can be certified, work experience is mandatory and coordinated, and general education courses are offered in an interdisciplinary, collaborated way.

Travel and Tourism Program Options

Program Element	Tourism Curriculum	Additional Skills/ Language	Work Experience	General Education/ Interdisc. coursework
Option 1/ Current Program	2 courses	Students do on their own.	Informal; instructor encourages volunteer work. Almost exclusively student initiated.	AA degree requires GE, not coordinated.
Option 2	Add more content courses that cover the general industry.	Coordinate with ESL and language programs.	Encourage placement through college co-op program or internships.	Target certain GE classes for program, such as marketing, computer applications, etc.
Option 3	Add more courses in blocks so students can specialize. Divide into two categories: business and leisure travel.	Increase coordination with ESL and language programs.	Develop work-based learning within the program; hire internship developer or co-op coordinator to monitor assignments.	Work with other departments to create Tourism and Travel cluster of courses.
Option 4	Expanded curricular offerings; different tracks of specialization to choose from.	Certify language proficiency coordinated with ESL and language programs.	Mandatory; well coordinated, including integration seminar; high quality assignments.	Coordinated in a cluster, smooth articulation with HS and 4-yrs.

Further Considerations

This report has provided research and analysis about the travel and tourism industry. It does not, and cannot, make decisions and recommendations about what college staff should do about the program. Rather, the report leads to a number of critical questions that can guide the decision making process. These include:

- What is the ultimate goal of the travel and tourism program?
- Who is currently served in the program, and who does the program want to serve in the future?

- What would a coherent road map for travel and tourism look like?

- How can this program collaborate with existing CCSF programs, in particular, the Hospitality program?

- What are the available resources for expansion?

This paper has analyzed trends and projections for the travel and tourism industry, and has drawn implications for education and training needs. Further steps include expanding the discussion by considering some of the questions above in addition to generating new ones. There is indeed potential in this industry for making a significant contribution; yet difficult decisions remain as to how this is most effectively and efficiently done.

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